



STATE OF MONTANA

JOB DESCRIPTION AND EVALUATION

SECTION I – Identification

Working Title Administrative Assistant		Position Number 15013
Pay Band 3	Job Code Number 436113	Job Code Title Administrative Support
Department Transportation		Division and Bureau Director's Office
Section and Unit Internal Audit		Work Address and Phone 2701 Prospect Ave Helena MT 59620 406.444.6200
Profile Produced By Kila Shepherd, IA HR Specialist Vickie Murphy, IA Manager		Work Phone 406.444.6046 406.444.6104

Description of the work unit:

The purpose of the Internal Audit Unit is to provide and maintain an effective and professional internal and external audit function for MDT. Provide reliable, detailed and accurate information and reports to MDT management. Protect the assets of MDT and the State of Montana. Promote compliance with laws, rules, policies and controls for the protections of the employees of MDT, the Directors Office and the citizens of Montana. Investigate internal problems and disputes as requested by the Director and provide accurate and unbiased information. To deter and eliminate fraud, collusion and other activity that is not in the best interest of MDT and/or the State of Montana. Recommend solutions to problems and provide guidance to personnel and management on audit activities. Establish and maintain professional standards and ethics in all duties assumed, assigned and performed. Operate independent of internal and external biases or influences and provide the Agency with complete and unbiased information. Represent the Director of MDT with integrity and a professional demeanor. Provide efficient and effective services to the Agency. The Internal Audit is a unit of the MDT Directors Office.

Purpose of the job:

This position will provide Administrative/Organizational support to 13 full time IAU staff. The staff includes the IAU Manager, two IAU Audit Supervisors, three Senior Auditors and four Lead Auditors, three Auditors, and one Audit Technician. This position will provide a wide range of administrative support services within the Unit. This includes office communication and reporting, records management, and various other administrative support services, such as maintaining, distributing, and storing audit, and review files and information; maintaining a very confidential and secure oracle data base, and motor fuels tax information; coordinating travel; maintaining staff calendars; compiling project status reports; covering the office for staff in travel status; and performing various other duties as needed. This position is required to sign and follow strict ethics and professional guidelines, and must be able to deal effectively with volatile and potentially dangerous audit and investigation clients. This position reports to the Internal Audit Unit Manager and does not supervise others.

SECTION II - Major Duties or Responsibilities

**% of
Time**

This section should be a clear concise statement of the position's major duties and the approximate

percent of work time for each duty.	
<p><u>A. ADMINISTRATIVE SUPPORT SERVICES</u></p> <p>This position provides administrative support services to Internal Audit, including reception, processing mail, photocopying, scheduling meetings, and other activities using knowledge of methods and procedures of office management; equipment and office inventories; functions and operations of various office software applications (e.g., word processing, database, spreadsheet, outlook, etc.); and Internal Audit Unit's goals, objectives, policies, and procedures.</p> <ol style="list-style-type: none"> 1. Serves as the initial public contact for the Unit/Bureau by phone and in person to ensure efficient reception services and Auditor protection. This involves greeting members of the public on the phone and in person; referring them to the appropriate staff member based on their individual needs; implementing appropriate processes for Auditor protection (i.e. does not allow clients to auditors work area unless the auditor is there to escort them) since the Unit may have clients that react strongly to financial assessments, personnel issues, or criminal protection; and assesses potential dangerous situations and alerts the appropriate Unit supervisor of the circumstances. 2. Sorts, routes, and distributes mail, facsimiles, and electronic messages to ensure timely delivery of correspondence and materials to appropriate Unit/Bureau staff. Coordinates express shipments (e.g., UPS, Federal Express, etc.), registered and bulk mailings, and other specialized delivery services with Bureau staff and service providers. Prioritizes mail to ensure that urgent incoming and outgoing mail is processed accordingly. Also determines whether incoming mail should be filed, and determines which project files are applicable. 3. Manages and maintains the Unit's/Bureau's office supply inventories by identifying needs, preparing supply orders, and stocking supplies according established purchasing and requisition policies and procedures, and occasionally upon request. This involves continually monitoring office inventories, identifying immediate needs and anticipating future needs (e.g., based upon specific program plans/projects), ordering necessary supplies and equipment, and tracking purchasing records to ensure the timely delivery of supplies. The incumbent must assess available products to determine the most cost-efficient equipment for office needs and ensure that invoices are attributed to proper budgets. 4. Manages and maintains the Bureau's office machines and equipment (e.g., photocopiers, faxes, telephones, etc.) by ensuring proper operation, performing routing maintenance and providing training to users on the effective use of office equipment. Organizes training and reference materials to ensure accessibility. Authorizes and coordinates requests for repairs, and documents service records. 5. Arranges and participates in meetings and training sessions by coordinating schedules, reserving meeting rooms, scheduling audio-visual equipment (e.g., overhead projectors, projector screens, public address equipment, etc.), providing notifications, and making travel arrangements as needed. Develops agendas and training materials and distributes to appropriate staff. Also provides input in staff meetings, and records, transcribes, and distributes meeting minutes to appropriate parties. 6. Maintains and updates Unit's/Bureau's various administrative manuals and forms. Monitors and incorporates modifications to policies and procedures, and ensures availability of current manuals for Bureau's administrative use. Coordinates printing of forms with the print shop. 7. Researches and compiles information for a variety of projects, meetings, and correspondence, and in response to various inquiries, complaints, and procedural problems. This involves interpreting specific information needs and determining appropriate sources based upon general directives from staff and supervisors; researching and compiling data from various sources; and summarizing findings and making recommendations to supervisors based on research results. 	45%

B. REPORTING AND RECORD MANAGEMENT

45%

This position administers office operations and activities, and conducts various processing, reporting, and communication functions using knowledge of methods and procedures of office management; research techniques; records management and varying retention rules; business and technical communication formats, compositions, and editorial practices; English grammar, spelling, and punctuation; functions and operations of various office software applications (e.g., word processing, database, spreadsheet, outlook, etc.); and Bureau goals, objectives, policies, and procedures.

1. Establishes and oversees extensive records management functions within the Bureau to ensure the accuracy and accessibility of essential program information. This includes establishing database and hard copy records systems and overseeing the ongoing maintenance of the Bureau's files and library. Ensures compliance with records management policies and retention schedules as well as variable retention requirements as specified in individual agreements, and coordinates archiving processes and paperwork as needed. Develops recommendations for new filing system based on assessment of records management needs, existing records, integration with other systems, and other factors. Maintains the Unit's Audit Library/Resource Center. .
2. Responsible for making sure all receipts are attached to pro-card charge forms for audit manager's signature. Routes phone, fax and motor pool charges to confirm the charges before submitting to audit manager for approval.
3. Composes a variety of reports according to general directives from the Internal Audit Unit Manager and Audit Supervisors. Identifies information needs and conducts research as needed, designs appropriate formats, composes content of reports and correspondence, edits and proofreads technical content provided by professional staff, and incorporates various graphics, tables, etc. using desktop publishing software based on assessment of effective publication presentation methods.
4. Establishes and oversees a training database for audit staff required training. Coordinates with audit staff to ensure copies of certificates are provided. Works with Human Resources to ensure individual training records reconcile with the unit's training records. Monitors the proposed training plan to the actual training provided to ensure the unit is complying with department rules related to the training grant and plans.
5. Responsible for establishing and maintaining a file system for the Internal Audit Manager. Identifies information needs, and establishes a logical system that permits the Internal Audit Manager to find information when it is needed.
6. Provides assistance to the audit technician during busy report processing times. This includes formatting audit reports, entering information into the IFTA and IRP spreadsheets, and finalizing audit files.

C. OTHER DUTIES AS ASSIGNED

10%

Performs a variety of other duties as assigned by the supervisor in support of the Department mission and Division objectives. This includes participating in special projects, participating in meetings and conferences, attending ongoing education and training, and performing a variety of other duties as assigned by supervisors.

If this position supervises other positions, complete the following information.

The number of employees supervised is 0.

Please list the occupation or title for each subordinate:

SECTION III - Minimum Qualifications - List the minimum requirements for **first day** of work.

Education and experience: Please check the one box that indicates the **minimum** educational requirements for this job:

- | | |
|--|---|
| <input type="checkbox"/> No education required | <input type="checkbox"/> 2 year job-related college or vocational training |
| <input checked="" type="checkbox"/> High school diploma or equivalent | <input type="checkbox"/> College degree (Bachelor's) |
| <input type="checkbox"/> 1 year job-related college or vocational training | <input type="checkbox"/> Post-graduate degree or equivalent (e.g. Master's, JD) |

Please list the acceptable fields of study or necessary knowledge and skills:

Please list any other education, training, certification, or licensing required:

Please check the one box that indicates the minimum amount of job-related work experience needed as a new employee on the first day of work:

- | | |
|---|---|
| <input type="checkbox"/> No prior work experience required | <input type="checkbox"/> 3 to 4 years job-related work experience |
| <input checked="" type="checkbox"/> 1 to 2 years of job-related work experience | <input type="checkbox"/> 5 or more years of job-related work experience |

Please describe any specialized experience needed for this job:

☐ This agency will accept alternative methods of obtaining necessary qualifications. Examples include:

SECTION IV – Other Important Job Information

Special requirements:

- | | |
|--|--|
| <input type="checkbox"/> Fingerprint check | <input checked="" type="checkbox"/> Valid driver's license |
| <input checked="" type="checkbox"/> Background check | <input type="checkbox"/> Other; Describe |

Other information including working conditions such as shifts, lifting requirements, travel or hours.

Some in-state travel may be required (less than 10%).

Please attach an organizational chart, on a separate page that includes at least the bureau level.

SECTION V – Signatures

My signature below (typed or hand written) indicates the statements in Section I to IV are accurate and complete.

Immediate Supervisor:

Vickie Murphy

Internal Audit Unit Manager

Signature

Title

Date

Administrative Review:

Signature

Title

Date

My signature below (typed or hand written) indicates that I have read this job description.

Employee:

Signature

Title

Date

Human Resources Review: My signature below (typed or hand written) indicates that Human Resources has reviewed this job description for completeness and has made the following determinations:

☐ FLSA Exempt

☒ FLSA Non-Exempt

☐ Telework Available

☐ Telework Not Available

☐ Classification Complete

☐ Organizational Chart attached

Human Resources:

Kila K Shepherd

Internal Audit HR Specialist

11.07.08

Signature

Title

Date